

Work Order # 7

New Policy to be	Chec	ked				
WO# 7		Client Code 123456		Policy Typ	pe	Rush Normal
Add Date 1-14-2020 2:43 AM		Start Date Ove	erride	Due Date	Override	Due Date 2-11-2020 2:43 AM
Policy Status		CSR 0		If Package, list what lines of coverage		
Documents Retrieve	ed	# of Document Retreived	ts	AM		Process
No		-		-		-
Policy Forms No		Donut Accoun	t	# Of		Policy Details
Action Bar						
Assign No	Hold No	l	Email No		Discard No	Issue No
Task Completed No		Update No		Sent to A No	udit	From Pending No
Hold Reason				Assign To		

General Information

Status Folder

Available Policies to Check

Branch Office Division

Policy Checked By QA Done by **Delivery By**

Second	QA D	one	By
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Department Profit Center Billing Type

- - -

Discrepancies Updated Sagitta Updated? EPIC updated to match AMS 360 updated to

Policy match Policy

No No No No

Automatic Download Sagitta Download

No No

Policy Information

Policy No Comlpexity

-

Client Name Carrier Name

Testing

2nd Check Document 3rd Check Document

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Updated

of AI/Supplemental # of Coverages # of Documents # of Endorsements

Names

0 0 0

of Hazards # of IM Items # of Locations # of Vehicles

0 0 0

Effective Date Policy Checked Against Company Bill Premium Request For

- - No

Billing Type Bookmarked CA Express Policy

- No No

Special Accounts VIN Verification USPS Verification Other PKG

No No No No

All Other BOP's/PKG 1 Billing Screen Updated

No No No

Delivery Status

Policy Filed Email Sent to AM Email Attached Checklist Attached

No No No No

Insured	Policy Attached to Email	Website Updated	Form Letter Attached
No	No	No	No
Rate Calculation Sheet A	o	=	CS Insurance Company
No	No	No	
Comments			
Incoming Email Detail	ils		
Requestor		Sent To	
Requestor		Sent To	
Summary		Sent To	
Summary	testing	Sent To	
Summary vjdfklbvdflbdfb bdf;bmdf	testing	Sent To	
Summary vjdfklbvdflbdfb bdf;bmdf Description	-	Sent To	
Summary vjdfklbvdflbdfb bdf;bmdf Description Testing purpose need to	-	Sent To	
Summary vjdfklbvdflbdfb bdf;bmdf Description Testing purpose need to	-	Sent To	
Summary vjdfklbvdflbdfb bdf;bmdf Description	-	Sent To	